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BondWave Enhances Effi Platform with the Launch of Rules

WHEATON, IL. - July 19, 2023 - BondWave, an affiliate of First Trust Portfolios L.P. and a leading financial technology firm focused on fixed income solutions, announced today the launch of Rules, a customizable and scalable new feature within the Effi® Portfolio Analytics suite that enables users to define specific criteria for bond portfolios, such as duration, credit rating, and sector allocation.

Designed to offer more control, transparency, and optimization throughout the portfolio management process, this new feature provides the ability to create and categorize rules using 35+ attributes to describe investment constraints and overall portfolio objectives. These rules are automatically enforced and can be assigned to one or more accounts to allow for analysis and reporting across users' entire book of business.

Rules of varying complexity can also be created to support various needs, from Reg BI monitoring to strategy creation, such as:

- Single attribute (e.g., Issuer Saturation) – A menu of single attributes can be offered as 'a la carte' options that reps can assign to their client portfolios, as appropriate.
- Style-box (e.g., Intermediate or Conservative) – Multiple attributes describing style and risk can be managed by the firm and mapped to client portfolios based on common categories found in an investment policy statement.
- Strategies (e.g., Short Conservative Tax-exempt) – Multiple attributes can be combined to create strategies used to monitor client portfolios.

"The industry is in need of a better way to manage and monitor client portfolios, as the demand for more control and transparency continues to mount," said Michael Ruvo, CEO of BondWave. "Today's launch will provide our Portfolio Analytics users with a valuable new tool that will enable them to create bespoke bond portfolios based on each clients' specific goals and objectives, while streamlining critical fiduciary and suitability responsibilities."

Rules is available to BondWave's Effi Portfolio Analytics clients, and users in trial with the Portfolio Analytics suite, at no additional cost.

For more information about Rules, please visit: https://bondwave.com/portfolio-analytics/?tab=5.

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ABOUT BONDWAVE LLC

Founded in 2001, BondWave®, an affiliate of First Trust Portfolios L.P., is a financial technology firm specializing in fixed income solutions. We serve a wide range of users including traders, compliance professionals, and RIAs from the smallest to the largest firms in the industry who use our tools to provide a superior fixed income experience to their clients while supporting critical regulatory mandates.

Effi®, our Engine for Fixed Income, is the single platform through which we deliver all our solutions providing intuitive dashboards and insights into every fixed income position and transaction. Capabilities include portfolio analytics and reporting, custom alerts, and proposal generation, as well as tools that support best execution, fair pricing, and mark-up monitoring and disclosure on both a pre- and post-trade basis. BondWave leverages advanced technologies and data science to develop proprietary data sets that fuel our innovative solutions.

MEDIA CONTACTS:

BondWave:

Carly Gray
Buttonwood Communications Group
(631)-560-8958
cgray@buttonwoodpr.com

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